



Example of Trust Operations Specialist Job Description

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Our company is hiring for a trust operations specialist. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for trust operations specialist

- Protects the interests of the bank and our clients by accurately reporting out of balance positions and/or transactions in a timely basis to internal business units
- May assist manager with reviewing and recommending new work procedures to improve daily operations
- May assist manager with establishing and/or maintaining department policy, procedures and desk operating manuals
- May serve as a back-up for the Operations Manager
- Enters participant distributions in Distribution Portal according to distributions instructions
- Coordinates the process of participant distributions according to instructions and reviews data entered in Distribution Portal to ensure accuracy
- Monitors the cash received for distributions or plan contributions and matches the funds with distribution details and investment directions
- Ensure that distributions instructions are complete and stored for audits request
- Participate in special projects and perform other duties and assignments as needed
- Daily assistance in the preparation and compilation of paper checks and coupons, sending and balancing of payment and coupon electronic files

- Prior trust/investment experience preferred
- Bachelor's degree in accounting, finance, economics, or related field is preferred
- 10 + years of relevant operational experience in Issuing and Paying Agent Services managing the processing of instructions with high monetary exposure and risk within key intraday deadlines
- Demonstrate a keen understanding the process flows and risk control programs for the business line and proactively manage and recommend appropriate changes
- Ability to analyze complex business needs or issues, recommend alternative solutions and implement corrective action
- Excellent interpersonal skills, able to build consensus among all levels of management and to effectively negotiate conflict resolutions